

# REDACTED

## CUSTOMER CLAIM

Claim Number \_\_\_\_\_

Date Received \_\_\_\_\_

### BERNARD L. MADOFF INVESTMENT SECURITIES LLC

In Liquidation

DECEMBER 11, 2008

Irving H. Picard, Esq.  
Trustee for Bernard L. Madoff Investment Securities LLC  
Claims Processing Center  
2100 McKinney Ave., Suite 800  
Dallas, TX 75201

Provide your office and home telephone no.

OFFICE: N/A

HOME: (561) 997-2203

Taxpayer I.D. Number (Social Security No.)

8902



1B0166

GERALD BLUMENTHAL

3193 NW 61ST STREET

BOCA RATON, FL 33496 3368

NTC & Co  
FBO GERALD BLUMENTHAL (43067)  
PO BOX 173859  
DENVER, CO 80217

(If incorrect, please change)

**NOTE:** BEFORE COMPLETING THIS CLAIM FORM, BE SURE TO READ CAREFULLY THE ACCOMPANYING INSTRUCTION SHEET. A SEPARATE CLAIM FORM SHOULD BE FILED FOR EACH ACCOUNT AND, TO RECEIVE THE FULL PROTECTION AFFORDED UNDER SIPA, ALL CUSTOMER CLAIMS MUST BE RECEIVED BY THE TRUSTEE ON OR BEFORE March 4, 2009. CLAIMS RECEIVED AFTER THAT DATE, BUT ON OR BEFORE July 2, 2009, WILL BE SUBJECT TO DELAYED PROCESSING AND TO BEING SATISFIED ON TERMS LESS FAVORABLE TO THE CLAIMANT. PLEASE SEND YOUR CLAIM FORM BY CERTIFIED MAIL - RETURN RECEIPT REQUESTED.

\*\*\*\*\*

1. Claim for money balances as of **December 11, 2008**:
  - a. The Broker owes me a Credit (Cr.) Balance of \_\_\_\_\_
  - b. I owe the Broker a Debit (Dr.) Balance of \_\_\_\_\_

REDACTED

CUSTOMER CLAIM

Claim Number \_\_\_\_\_

Date Received \_\_\_\_\_

BERNARD L. MADOFF INVESTMENT SECURITIES LLC

In Liquidation

DECEMBER 11, 2008

(Please print or type)

Name of Customer: Gerald Blumenthal  
Mailing Address: 3193 NW 61st Street  
City: Boca Raton State: FL Zip: 33496  
Account No.: 1-B0166-3-0  
Taxpayer I.D. Number (Social Security No.): -8902

NOTE: BEFORE COMPLETING THIS CLAIM FORM, BE SURE TO READ CAREFULLY THE ACCOMPANYING INSTRUCTION SHEET. A SEPARATE CLAIM FORM SHOULD BE FILED FOR EACH ACCOUNT AND, TO RECEIVE THE FULL PROTECTION AFFORDED UNDER SIPA, ALL CUSTOMER CLAIMS MUST BE RECEIVED BY THE TRUSTEE ON OR BEFORE March 4, 2009. CLAIMS RECEIVED AFTER THAT DATE, BUT ON OR BEFORE July 2, 2009, WILL BE SUBJECT TO DELAYED PROCESSING AND TO BEING SATISFIED ON TERMS LESS FAVORABLE TO THE CLAIMANT. PLEASE SEND YOUR CLAIM FORM BY CERTIFIED MAIL - RETURN RECEIPT REQUESTED.

\*\*\*\*\*

1. Claim for money balances as of December 11, 2008:

- a. The Broker owes me a Credit (Cr.) Balance of \$ -0-
- b. I owe the Broker a Debit (Dr.) Balance of \$ -0-
- c. If you wish to repay the Debit Balance,  
please insert the amount you wish to repay and  
attach a check payable to "Irving H. Picard, Esq.,  
Trustee for Bernard L. Madoff Investment Securities LLC."  
If you wish to make a payment, it must be enclosed  
with this claim form. \$ \_\_\_\_\_
- d. If balance is zero, insert "None." None

2. Claim for securities as of **December 11, 2008**:

**PLEASE DO NOT CLAIM ANY SECURITIES YOU HAVE IN YOUR POSSESSION.**

	<u>YES</u>	<u>NO</u>
a. The Broker owes me securities	<u>X</u>	
b. I owe the Broker securities		<u>X</u>
c. If yes to either, please list below:		

Date of Transaction (trade date)	Name of Security	Number of Shares or Face Amount of Bonds	The Broker Owes Me (Long)	I Owe the Broker (Short)
See Nov. 30, 2008 Statement for account 1-B0166-3-0 and 1-B0166-4-0, attached hereto as Exhibit A				
\$ <u>4,338,515.93</u>	(market value of securities long per statement 1-B0166-3-0)			
<u>151,800.00</u>	(market value of securities long per statement 1-B0166-4-0)			
<u>(214,360.00)</u>	(market value of securities short per statement 1-B0166-4-0)			
Total: \$ <u>4,275,955.93</u>				

Proper documentation can speed the review, allowance and satisfaction of your claim and shorten the time required to deliver your securities and cash to you. Please enclose, if possible, copies of your last account statement and purchase or sale confirmations and checks which relate to the securities or cash you claim, and any other documentation, such as correspondence, which you believe will be of assistance in processing your claim. In particular, you should provide all documentation (such as cancelled checks, receipts from the Debtor, proof of wire transfers, etc.) of your deposits of cash or securities with the Debtor from as far back as you have documentation. You should also provide all documentation or information regarding any withdrawals you have ever made or payments received from the Debtor.

See Exhibits A and B, and documents submitted herewith.

Please explain any differences between the securities or cash claimed and the cash balance and securities positions on your last account statement. If, at any time, you complained in writing about the handling of your account to any person or entity or regulatory authority, and the complaint relates to the cash and/or securities that you are now seeking, please be sure to provide with your claim copies of the complaint and all related correspondence, as well as copies of any replies that you received.

**PLEASE CHECK THE APPROPRIATE ANSWER FOR ITEMS 3 THROUGH 9.**

**NOTE: IF "YES" IS MARKED ON ANY ITEM, PROVIDE A DETAILED EXPLANATION ON A SIGNED ATTACHMENT. IF SUFFICIENT DETAILS ARE NOT PROVIDED, THIS CLAIM FORM WILL BE RETURNED FOR YOUR COMPLETION.**

- |   | <u>YES</u> | <u>NO</u>   |
|---|------------|-------------|
| 3. Has there been any change in your account since December 11, 2008? If so, please explain.  | _____      | _____X_____ |
| 4. Are you or were you a director, officer, partner, shareholder, lender to or capital contributor of the broker?   | _____      | _____X_____ |
| 5. Are or were you a person who, directly or indirectly and through agreement or otherwise, exercised or had the power to exercise a controlling influence over the management or policies of the broker? | _____      | _____X_____ |
| 6. Are you related to, or do you have any business venture with, any of the persons specified in "4" above, or any employee or other person associated in any way with the broker? If so, give name(s)    | _____      | _____X_____ |
| 7. Is this claim being filed by or on behalf of a broker or dealer or a bank? If so, provide documentation with respect to each public customer on whose behalf you are claiming.                         | _____      | _____X_____ |
| 8. Have you ever given any discretionary authority to any person to execute securities transactions with or through the broker on your behalf? Give names, addresses and phone numbers.                   | _____      | _____X_____ |
| 9. Have you or any member of your family ever filed a claim under the Securities Investor Protection Act of 1970? if so, give name of that broker.  | _____      | _____X_____ |

Please list the full name and address of anyone assisting you in the preparation of this claim form: Joshua H. Vinik, Milberg LLP,

One Pennsylvania Plaza, New York, NY 10119


9. Have you or any member of your family ever filed a claim under the Securities Investor Protection Act of 1970? if so, give name of that broker. \_\_\_\_\_

Please list the full name and address of anyone assisting you in the preparation of this claim form: \_\_\_\_\_

If you cannot compute the amount of your claim, you may file an estimated claim. In that case, please indicate your claim is an estimated claim.

**IT IS A VIOLATION OF FEDERAL LAW TO FILE A FRAUDULENT CLAIM. CONVICTION CAN RESULT IN A FINE OF NOT MORE THAN \$50,000 OR IMPRISONMENT FOR NOT MORE THAN FIVE YEARS OR BOTH.**

**THE FOREGOING CLAIM IS TRUE AND ACCURATE TO THE BEST OF MY INFORMATION AND BELIEF.**

Date 3/6/09 Signature   
Date \_\_\_\_\_ Signature \_\_\_\_\_

(If ownership of the account is shared, all must sign above. Give each owner's name, address, phone number, and extent of ownership on a signed separate sheet. If other than a personal account, e.g., corporate, trustee, custodian, etc., also state your capacity and authority. Please supply the trust agreement or other proof of authority.)

**This customer claim form must be completed and mailed promptly, together with supporting documentation, etc. to:**

Irving H. Picard, Esq.,  
Trustee for Bernard L. Madoff Investment Securities LLC  
Claims Processing Center  
2100 McKinney Ave., Suite 800  
Dallas, TX 75201



**\*\*DUPLICATE\*\* FOR ACCOUNT NTC & CO.**  
GERALD BLUMENTHAL

3193 NW 61ST STREET  
BOCA RATON FL 33496

885 Third Avenue  
New York, NY 10022  
(212) 230-2424  
800 334-1343  
Fax (212) 838-4061

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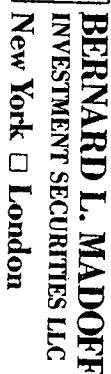
1-B0166-3-0  
\*\*\*\*\*6253

11/30/08  
1

Affiliated with  
Madoff Securities International Limited  
12 Berkeley Street  
Mayfair, London W1J 8DT  
Tel 020 7493 6222

DATE	BOUGHT RECEIVED	SOLD DELIVERED	TIN	DESCRIPTION	PRICE OR SYMBOL	AMOUNT DEBITED TO YOUR ACCOUNT	AMOUNT CREDITED TO YOUR ACCOUNT
11/12				BALANCE FORWARD		260,153.05	
11/12	2,392		2114	WAL-MART STORES INC	55.830	133,640.36	
11/12	1,756.4		2010	INTERNATIONAL BUSINESS MACHS	87.270	136,552.28	
11/12	5,796		6440	EXXON MOBIL CORP	72.880	422,643.48	
11/12	6,348		6942	INTEL CORP	14.510	92,362.48	
11/12	3,036		11268	JOHNSON & JOHNSON	59.580	181,400.588	
11/12	4,140		15594	J.P. MORGAN CHASE & CO	38.530	159,879.20	
11/12	2,208		19919	COCA COLA CO	44.660	98,697.28	
11/12	1,288		24245	MCDONALDS CORP	55.370	71,367.56	
11/12	2,392		28571	ALCOA CO	28.550	68,286.60	
11/12	8,740		32897	MICROSOFT CORP	21.810	190,968.40	
11/12	4,416		37223	ORACLE CORPORATION	17.300	76,572.80	
11/12	1,748		50201	PEPSICO INC	56.410	98,673.68	
11/12	1,012		50703	APPLE INC	100.780	102,029.36	
11/12	7,452		54527	PFIZER INC	16.940	126,534.88	
11/12	1,748		55029	ABBOTT LABORATORIES	54.610	95,527.28	
11/12	3,312		58853	PROCTER & GAMBLE CO	64.080	212,364.96	
11/12	1,196		59355	AMGEN INC	59.160	70,802.36	
11/12	2,500		63179	PHILLIP MORRIS INTERNATIONAL	43.600	100,372.00	
11/12	5,520		63681	BANK OF AMERICA	21.590	119,396.80	
11/12	1,840		67505	QUALCOMM INC	33.770	62,209.80	
11/12	5,980		68007	CITIGROUP INC	12.510	75,048.80	
11/12	1,380		71831	SCHLUMBERGER LTD	49.480	68,337.40	
11/12	3,312		72333	COMCAST CORP	16.510	54,813.12	
				CL A			

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**885 Third Avenue  
New York, NY 10022  
(212) 230-2424  
800 334-1343  
Fax (212) 838-4061**

**Affiliated with**  
**Madoff Securities International Limited**  
12 Berkeley Street  
Mayfair, London W1J 8DT  
Tel 020 7493 6222

3193 NW 61ST STREET  
BOCA RATON FL 33496

1-B0166-3-0

6253

11/30/08

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DATE	BOUGHT RECEIVED	SALE DELIVERED	TIN	DESCRIPTION	PRICE OR SYMBOL	AMOUNT CREDITED TO YOUR ACCOUNT	AMOUNT CREDITED TO YOUR ACCOUNT
11/12	6,532		76157	AT&T INC	27	176,625.00	
11/12	1,656		76659	CONOCOPHILLIPS	52.510	87,022.56	
11/12	1,704		80483	UNITED PARCEL SVG INC	52.040	87,696.16	
11/12	6,716		80985	CISCO SYSTEMS INC	16.730	112,626.68	
11/12	1,932		84809	U.S. BANCORP	29.530	57,128.96	
11/12	2,500		85311	CHEVRON CORP	73.430	168,981.00	
11/12	1,104		89195	UNITED TECHNOLOGIES CORP	53.160	58,792.64	
11/12	11,684		89637	GENERAL ELECTRIC CO	19.630	229,823.92	
11/12	3,128		93461	VERIZON COMMUNICATIONS	30.410	95,247.48	
11/12	276		95963	GOOGLE	337.400	93,193.40	
11/12	3,864		97787	WELLS FARGO C. CO NEW	29.800	115,904.20	
11/12	2,760		98289	HEWLETT PACKARD CO	34.900	96,434.00	
11/12		4,175,000	20400	U.S. TREASURY BILL DUE 2/12/2009	99.936		4,172,328.00
11/12				FIDELITY SPARTAN U.S. TREASURY MONEY MARKET DIV 11/12/08	DIV		13.40
11/12		22,178	15498	FIDELITY SPARTAN U.S. TREASURY MONEY MARKET	1		22,178.00
11/12	9,396		24867	FIDELITY SPARTAN U.S. TREASURY MONEY MARKET FIDELITY SPARTAN U.S. TREASURY MONEY MARKET DIV 11/19/08	1 DIV	9,396.00	1.15
11/19				CONTINUED ON PAGE 3			

**BERNARD L. MADOFF**  
INVESTMENT SECURITIES LLC  
New York ☐ London

**\*\*DUPLICATE\*\* FOR ACCOUNT NTC & CO.**  
GERALD BLUMENTHAL

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3193 NW 61ST STREET  
BOCA RATON FL 33496

ACCOUNT NUMBER  
**1-B0166-3-0**  
DATE OF LAST STATEMENT  
**11/30/08**  
PAGE  
**3**  
ACCOUNT BALANCE  
**\*\*\*\*\*6253**

DATE	BOUGHT PAID	SOLO DELIVERED	TAN	DESCRIPTION	PRICE OR SYMBOL	AMOUNT DEBITED TO YOUR ACCOUNT	AMOUNT CREDITED TO YOUR ACCOUNT
11/19		9,396	50110	FIDELITY SPARTAN	1		9,396.00
11/19	275,000		56754	U.S. TREASURY MONEY MARKET U.S. TREASURY BILL DUE 03/26/2009 3/26/2009	99.926	274,796.50	
11/19	10,233		59151	FIDELITY SPARTAN U.S. TREASURY MONEY MARKET	1	10,233.00	
				NEW BALANCE		517,201.76	
	6,532			SECURITY POSITIONS	MKT PRICES		
	1,748			AET INC	28.560		
	1,196			ABBOTT LABORATORIES	52.390		
	1,012			AMGEN INC	55.540		
	5,520			APPLE INC	92.670		
	2,300			BANK OF AMERICA	16.250		
	6,716			CHEVRON CORP	79.010		
	1,980			CISCO SYSTEMS INC	16.540		
	2,208			GLAT GROUP INC	8.290		
	3,312			GOCA COLA CO	46.870		
				COMCAST CORP	17.340		
	1,956			GLA			
	5,796			CONOCOPHILIPS	52.520		
	11,684			EXXON MOBIL CORP	80.150		
				GENERAL ELECTRIC CO	17.170		
				CONTINUED ON PAGE 4			

**BERNARD L. MADOFF**  
INVESTMENT SECURITIES LLC  
New York ☐ London

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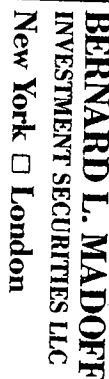
3193 NW 61ST STREET  
BOCA RATON FL 33496

885 Third Avenue  
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(212) 230-2424  
800 334-1343  
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DATE OF ACCOUNT STATEMENT: 11/30/08  
DATE OF ACCOUNT IDENTIFICATION NUMBER: \*\*\*\*\*6253  
PAGE: 4

Attributed with  
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Tel 020 7493 6222

DATE	BOUGHT RECEIVED	SOLD DELIVERED	TIN	DESCRIPTION	PRICE OR SYMBOL	AMOUNT DEBITED TO YOUR ACCOUNT	AMOUNT CREDITED TO YOUR ACCOUNT
276	29,760			GOOGLE	292.960		
6,348				HEWLETT-PACKARD CO	35.280		
1,964				INTEL CORP	115.800		
4,140				INTERNATIONAL BUSINESS MACHS	81.600		
3,036				J.P. MORGAN CHASE & CO	31.660		
1,288				JOHNSON & JOHNSON	58.580		
2,992				MCDONALDS CORP	58.750		
8,740				MERCK & CO	26.120		
4,416				MICROSOFT CORP	20.220		
1,748				ORACLE CORPORATION	16.090		
7,492				PEPSICO INC	56.700		
2,300				Pfizer Inc	16.490		
3,312				PHILLIP MORRIS INTERNATIONAL	42.160		
1,840				PROCTER & GAMBLE CO	64.350		
1,980				QUALCOMM INC	33.570		
10,233				SCHLUMBERGER LTD	50.740		
				FIDELITY SPARTAN	1		
1,932				U S TREASURY MONEY MARKET			
1,104				U S BANCORP	26.980		
				UNITED PARCEL SVC INC	57.600		
				CLASS B			
275,000				U S TREASURY BILL	99.971		
				DUE 03/26/2009			
				3/26/2009			
1,104				UNITED TECHNOLOGIES CORP	48.530		
CONTINUED ON PAGE 5							



\*\*\*DUPLICATE\*\* FOR ACCOUNT NTC & CO.  
GERALD BLUMENTHAL

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Mayfair, London W1J 8DT  
Tel 020 7493 6222

3193 NW 61ST STREET  
BOCA RATON

FL 33496

1-80166-3-0

11/30/08

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\*\*\*\*\*6253

DATE	BOUGHT RECEIVED	SOLD DELIVERED	TIN	DESCRIPTION	PRICE OR SYMBOL	AMOUNT DEBITED TO YOUR ACCOUNT	AMOUNT CREDITED TO YOUR ACCOUNT
	3,128			VERIZON COMMUNICATIONS	32.650		
	2,992			WAL-MART STORES INC	55.890		
	3,866			WELLS FARGO & CO INC	28.890		
				MARKET VALUE OF SECURITIES			
				LONG			
				SHORT			
				40387515.93			

**Affiliated with**  
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12 Berkeley Street  
Mayfair, London W1J 8DT  
Tel 020 7493 6222

**Fax (212) 838-4061**

[illegible]



**BERNARD L. MADOFF**  
INVESTMENT SECURITIES LLC  
New York ☐ London

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GERALD BLUMENTHAL

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3193 NW 61ST STREET  
BOCA RATON FL 33496

1-B0166-4-0  
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96-135-6753

11/30/08  
1

DATE	BOUGHT RECEIVED	SAID DELIVERED	TEN	DESCRIPTION	PRICE OR SYMBOL	AMOUNT DEBITED TO YOUR ACCOUNT	AMOUNT CREDITED TO YOUR ACCOUNT
11/11		92	41549	S & P 100 INDEX NOVEMBER 450 CALL	45.000		145,268.00
11/12	92		45875	S & P 100 INDEX NOVEMBER 450 PUT	17.800	163,852.00	
11/19		92	31980	S & P 100 INDEX DECEMBER 430 CALL	26		239,108.00
11/19	92		36305	S & P 100 INDEX DECEMBER 420 PUT	30	276,092.00	
11/19		92	40680	S & P 100 INDEX NOVEMBER 450 CALL	3	27,692.00	
11/19		92	44955	S & P 100 INDEX NOVEMBER 450 PUT	37		340,308.00
				NEW BALANCE			517,202.00
				SECURITY POSITIONS			
		92		S & P 100 INDEX	MKT PRICE 23.000		
	92			DECEMBER 430 CALL			
				S & P 100 INDEX	16.500		
				DECEMBER 420 PUT			
				MARKET VALUE OF SECURITIES			
				LONG			
				151,800.00			
				SHORT			
				214,369.00			

**EXHIBIT B**

1. This Claim Form, exhibits, and supporting documentation (collectively "Claim Form") is submitted pursuant to the December 23, 2008 Order of the Honorable Burton R. Lifland and the instructions disseminated by Irving H. Picard, Trustee for Bernard L. Madoff Investment Securities LLC ("Trustee"), on December 11, 2008.
2. The information provided in the Claim Form is based on information provided in the Claimant's latest Madoff account statement and additional information known by the Claimant as of the date of the submission of the Claim Form. The Claimant reserves the right to amend and/or supplement this Claim Form upon the receipt of further information, or upon request by the Trustee for additional information.
3. The Claimant reserves the right to amend the Claim Form in the event of any recoveries by the Trustee or any other party under the avoidance powers of the Bankruptcy Code or otherwise, or in the event of rejections of executory contracts pursuant to Bankruptcy Code Section 365, whether such amendments are made pursuant to Bankruptcy Code Sections 105, 502(g), or 502(h), Bankruptcy Rule 3002(c)(3), (4), other provisions of applicable bankruptcy law, or general principles of law or equity.
4. The Claimant hereby requests that the Claim Form be considered as a proof of claim in *In re Bernard L. Madoff Investment Securities LLC*, No. 08-01789 (Bankr. S.D.N.Y.).
5. This Claim Form is required to be submitted pursuant to the Court's January 2, 2009 Order and the Trustee's instructions to the Claimant. To the extent permitted by applicable law, the Claimant does not, by submitting the Claim Form, consent to the jurisdiction of the Bankruptcy Court nor does Claimant waive any right to trial by jury.
6. The Claimant reserves all rights, claims, and/or defenses as to and/or against any and all parties potentially liable for the losses sustained by the Claimant, including, without limitation, Bernard L. Madoff Investment Securities LLC and its owners, partners, employees, and affiliates, as well as any potentially liable third parties including, without limitation, investment advisors, "feeder funds," accountants, and auditors.
7. The Claimant further reserves all rights, claims, and/or defenses as to and/or against any persons and/or creditors asserting claims against Bernard L. Madoff Investment Securities LLC, its employees, owners, and/or affiliates, in bankruptcy or otherwise.

8. The Claimant reserves all objections as to the competence, relevance, materiality, privilege, or admissibility of evidence in any subsequent proceeding or trial of this or any other action for any purpose whatsoever, notwithstanding the submission of any such information to the Trustee.
9. To the extent the Claimant has disclosed to the Trustee documents containing accounting and/or legal advice, the Claimant does not waive any potential privileges applicable thereto.
10. The Claimant reserves all rights with respect to submitting information to the Internal Revenue Service regarding gains, losses, and/or theft of assets.
11. The Claim Form and supporting documents contain confidential information. The Claimant submits this information to the Trustee subject to the condition that this information will not be disclosed to any third parties, other than under seal to the Court, absent the Claimant's express consent or Court order.
12. The Claimant submits herewith documents in support of the Claimant's claim, including documents containing information regarding account transactions, such as contributions and/or withdrawals. The Claimant reserves any arguments that such documents are not relevant to the Trustee's inquiry. The Claimant further reserves the right to supplement this submission, including the submission of additional documents, if deemed necessary. Below is a list of the documents submitted herewith:

**1995:**

- Copies of certain Account Statements for period 8/31 - 12/31.
- Copy of Letter from Retirement Accounts Inc. to Gerald Blumenthal dated July 25 with attachment.
- Copy of 1099-R Data Request Form for Distribution from Qualified Retirement Plans.

**1996:**

- Copies of certain Account Statements for period 1/31 - 12/31.

**1997:**

- Copies Certain Account Statements for period 1/31 - 12/31.

**1998:**

- Copy of Individual Retirement Account Statement, Account Summary, 10/1-12/31.
- Copies of certain Account Statements for period 1/31-12/31.

**1999:**

- Copies of certain Account Statements for period 1/31-12/31.
- Copy of Individual Retirement Account Statement, Account Summary 7/1-9/30 and 10/1-12/31. Retirement Accounts, Inc.

**2000:**

- Copies of Certain Account Statements for period 1/31-12/31.
- Copy of Individual Retirement Account Statement, Account Summary, 10/1-12/31.

**2001:**

- Copies of Certain Account Statements for period 1/31-12/31.
- Copy of Individual Retirement Account Statement, Account Summary 10/1-12/31.

**2002:**

- Copy of Individual Retirement Account Statement, Account Summary 10/1-12/31, Retirement Accounts, Inc.

**2003:**

- Copies of certain Account Statements for period 1/31-12/31.
- Copy of Individual Retirement Account Statement, Account Summary 10/1-12/31, Retirement Accounts, Inc.

**2004:**

- Copies of certain Account Statements for period 1/31-12/31.
- Copies of Portfolio Management Reports dated 3/31 and 6/30.
- Copy of Individual Retirement Account Statement, Account Summary 10/1-12/31, Retirement Accounts, Inc.

**2005:**

- Copies of Certain Account Statements for period 1/31-12/31.
- Copy of Traditional IRA Account Summary 10/1-12/31, Fiserv.

**2006:**

- Copies of Certain Account Statements for period 1/31-12/31.
- Copy of Traditional IRA Account Summary 10/1-12/31, Fiserv.

**2007:**

- Copies of certain Account Statements for period 1/31-12/31.
- Copy of Traditional IRA Account Summary 10/1-12/31, Fiserv.

**2008:**

- Copies of certain Account Statements for period 9/30-11/30.
- Copy of Traditional IRA Account Summary 10/1-12/31, Fiserv.

**2009:**

- Copy of Letter from Fiserv Investment Support Services to Gerald Blumenthal dated February 6.
-